

Benton County Brand Health & Perception Research

Prepared for Benton County

July 2024

THE CLOSEST TO THE CUSTOMER WINS.



Project Overview

Purpose. To assess the awareness and perception of Benton County's brand as a travel destination, and to measure its brand health relative to regional competitors. This study will serve as a baseline for future research, allowing Benton County to measure growth as future marketing campaigns are employed.

Throughout the presentation, Benton County's brand insights have been compared to competitive set averages and H2R's Proprietary Industry Norms (H2R Norms) where applicable. This will help provide a deeper understanding of how Benton County performs relative to both its competitive set and against destinations around the country.

Target Audience. This study was conducted among a professionally managed panel of travelers living within 300 miles of Benton County, Missouri and who were familiar with Benton County as a leisure travel destination plus a handful of respondents from the internal house list.

Sample. A total of 410 travelers were interviewed for this study, providing a maximum margin of error of +/-4.8% at a 95% confidence interval. This includes 400 gen pop panel respondents, 10 from the house list, 75 recent visitors, 126 lapsed visitors and 209 non-visitors*.

**Recent Visitors = Visited Benton County within the past 3 years
Lapsed Visitors = Visited Benton County, but not within past 3 years
Familiar Non-Visitors = Familiar with Benton County, but have never visited*

H2R Proprietary Industry Norms

- For select data points, this study references H2R Proprietary Industry Norms. This is normative data created, implemented and curated by H2R Market Research and is used to provide broader context for the results of each themed concept.
- The H2R Norms are an application of a disciplined methodology where the wording of questions, positioning, scales and target markets are of a similar character, size and scope.
- They have been curated over the past two years from comparable studies conducted in the destinations marketplace.



Key Takeaways

- **Known for Beauty & Outdoor Offerings.** The Benton County area is well known for its beautiful scenery, plethora of outdoor recreational activities and its proximity to lakes. Visitors also found availability of outdoor recreation and water activities to be strengths, along with affordability and a safe and wholesome environment. Additionally, recent visitors indicated that a variety of outdoor activities influenced their visit—fishing, Truman Lake, boating and wildlife viewing among them. However, Benton County’s proximity to big name lakes impacts how top of mind it is, along with its brand health.
- **Middle of the Road Brand Health.** Benton County is in the middle of its competitive set over the course of several brand health measurements. While consistently outscoring Truman Lake and Pomme de Terre, Benton County trails Lake of the Ozarks and Table Rock Lake across all brand health metrics. This is first seen in Market Share but was also evident in intent to visit and the area’s reputation. However, Benton County had one of the largest ratios of considerers, hinting that there is great potential for visitation in the future.
- **Outperforming H2R Norms.** Despite trailing nearby regional competitors, Benton County outscored the H2R Norm across a variety of metrics. Examples include Market Share (+9 pts), Intent to Visit (+10 pts) and Net Change in Opinion (+6 pts). Meaning, things that regional travelers have heard about Benton County in the past six months have generated a positive net change in opinion.

Key Takeaways

- **Hurdles to Visitation Among Lapsed Visitors.** Benton County has a large ratio of lapsed visitors. This group revealed that the main hurdles keeping them from a return visit is a preference for other destinations, Benton County not being top of mind when planning trips, and the area not having any “must see” experiences compelling a return. And while correlating these stated hurdles with intent to return yields the same results, it revealed that a lack of good dining facility was also a hinderance.
- **Barriers to Visitation Among Non-Visitors.** Non-visitors cited lack of knowledge about the area, preference for other destinations and not having received any recommendations as the top barriers to visitation. However, correlation with intent to visit reveals that lack of interest in the area and its activities are also preventing many, along with a spouse that has no desire to visit. However, both lapsed and non-visitors alike noted that availability of outdoor recreation and specific attractions and events would motivate a visit, along with loved ones having a desire to visit. Boosting marketing efforts would likely go a long way in converting these segments into visitors.
- **Visitors Likely to Recommend.** Three in four recent Benton County visitors have visited either earlier this year or last, and the typical visitor returns to the area twice per year. Having fun, getting away from stress and being able to provide family with a memorable experience were the most important factors in deciding to visit Benton County. The area clearly delivered on those objectives, as those who have visited Benton County recently are likely to recommend the area to others, indicating a Net Promoter Score of 34%, a notable 25 points above the H2R Norm.

01. Brand Perception

Pages 7 - 17

02. Brand Health

Pages 18 - 26

03. Hurdles/Barriers To Visitation

Pages 27 - 33

04. Benton County Visitor Profile

Pages 34 - 46

01. Brand Health

N=400

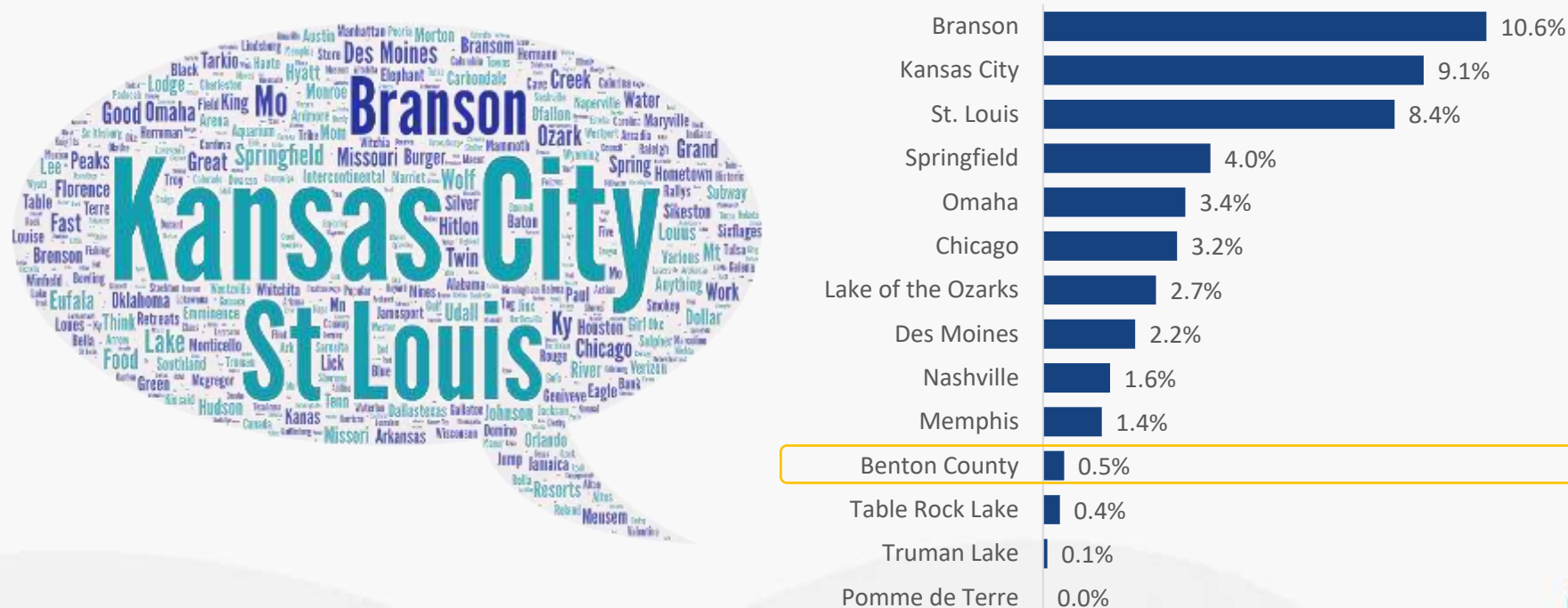
02. Brand Perception

03. Barriers to Visitation

04. Benton County Visitor Profile

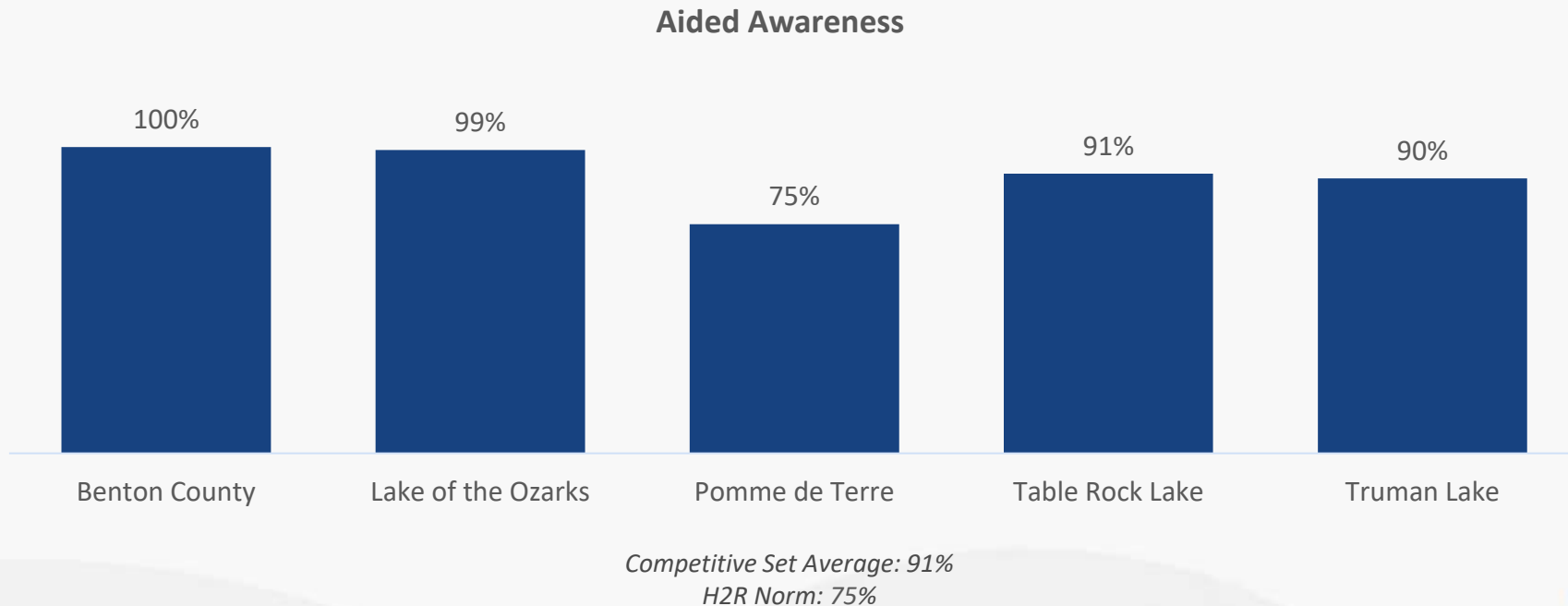
While not a top-of-mind destination in comparison to other big cities such as Branson, Kansas City and St. Louis, the Benton County area was mentioned more often than nearly any other destination in the competitive set.

Top of Mind Destinations – Any Mention



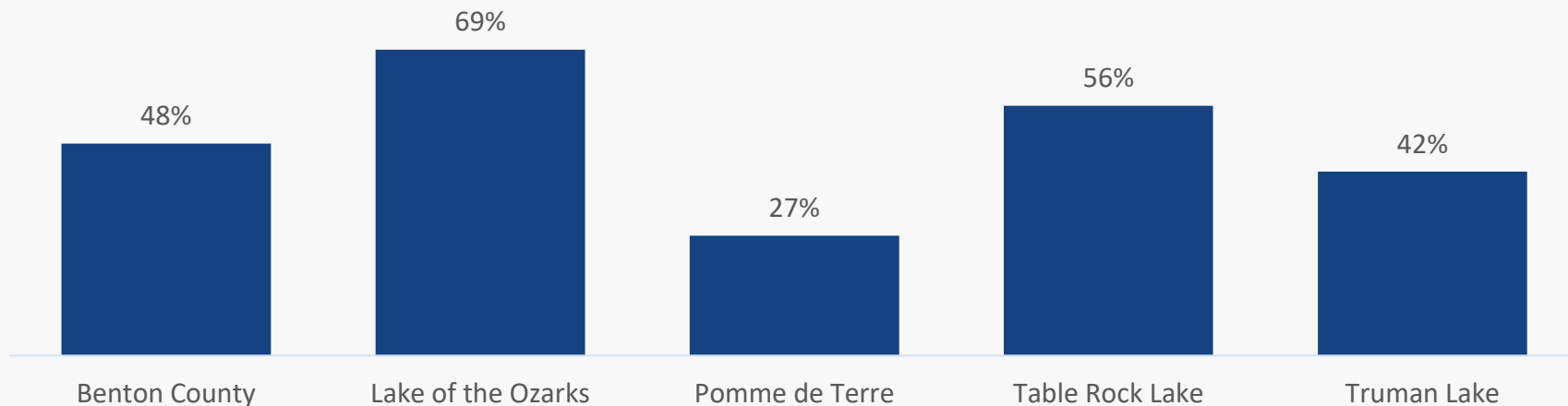
Q5: When you think of overnight or weekend getaways within driving distance of home (2-3 hours), which destinations first come to mind?

For the purpose of this study, all respondents had to be familiar with Benton County. Those familiar with Benton County were also likely to be familiar with Lake of the Ozarks, Table Rock Lake and Truman Lake.



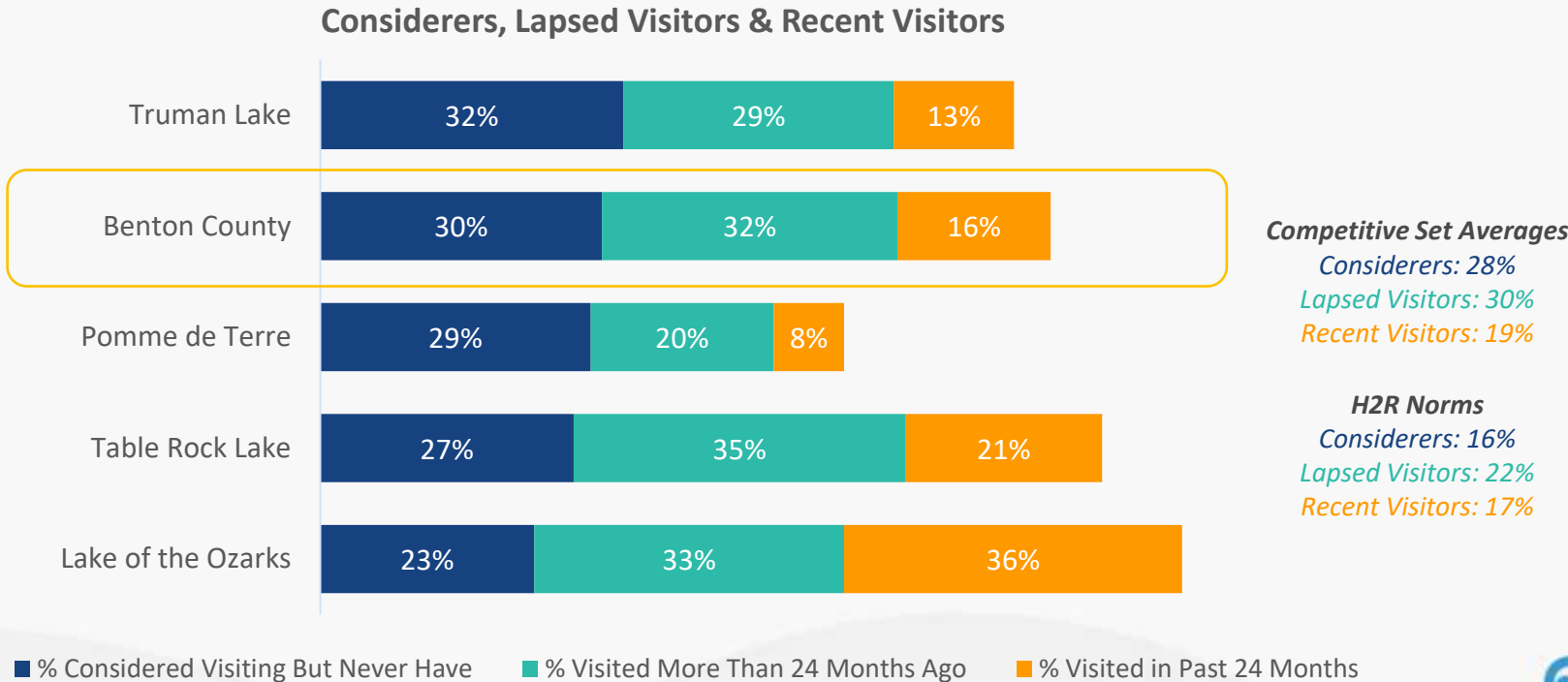
Visitation to the area ranks third behind Lake of the Ozarks and Table Rock Lake; although, it is in line with the competitive set average and well above the H2R Norm.

Market Share – Visited Ever



Competitive Set Average: 48%
H2R Norm: 39%

Benton County has one of the largest ratios of considerers (30%) among the comp set (28%) and 14 points higher than H2R's Norm. However, most travelers who have visited the area are lapsed visitors giving Benton County one of the smaller ratios of recent visitors at 16%.

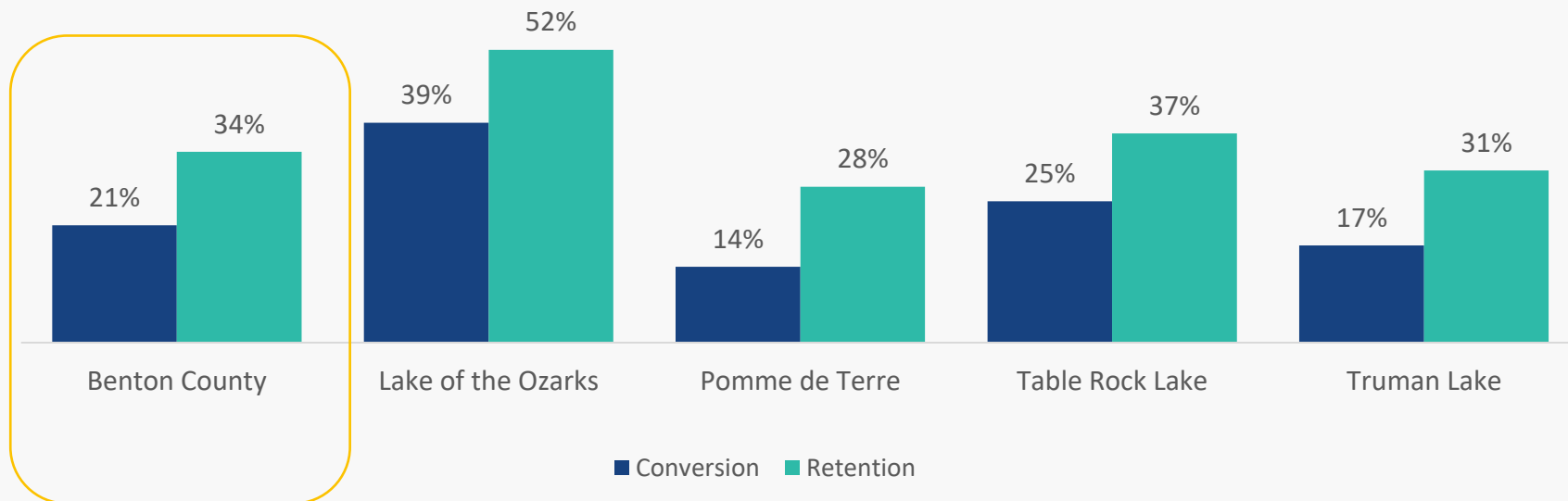


Q9: Please indicate your familiarity and/or prior visitation of the following parts of Missouri *for leisure purposes*. 5-pt. scale



Benton County's conversion (21%) and retention (34%) rates are near average among the competitive set and top both Truman Lake and Pomme de Terre.

Conversion & Retention Rates*



Competitive Set Averages

Conversion: 23%

Retention: 36%

H2R Norms

Conversion: 30%

Retention: 41%

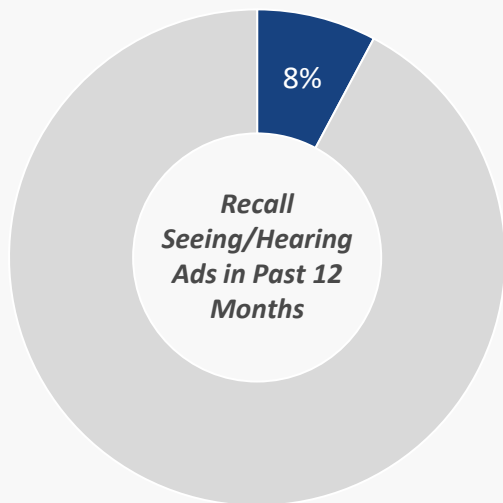
*Conversion Rate=Recent Visitors ÷ Market Potential

Retention Rate=Recent Visitors ÷ Visitors Ever

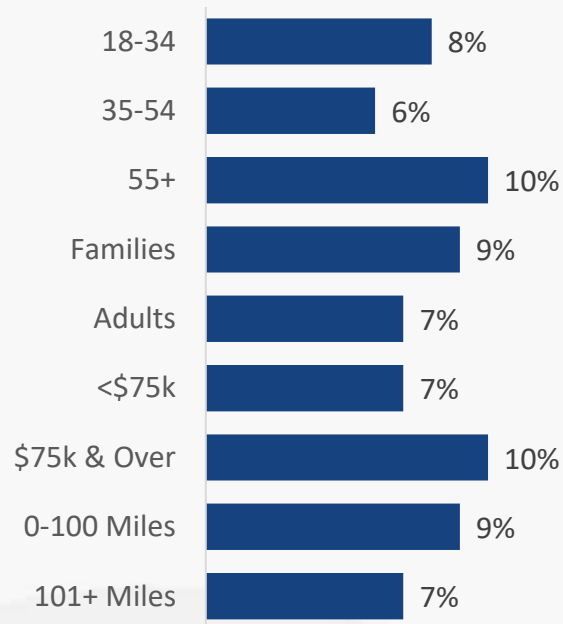
Q9: Please indicate your familiarity and/or prior visitation of the following parts of Missouri *for leisure purposes*. 5-pt. scale

One in ten regional travelers say they recall seeing or hearing an ad for Benton County within the past 12 months and share of voice runs highest among those over 55 years of age and those earning more than \$75k per year.

Share of Voice – Benton County



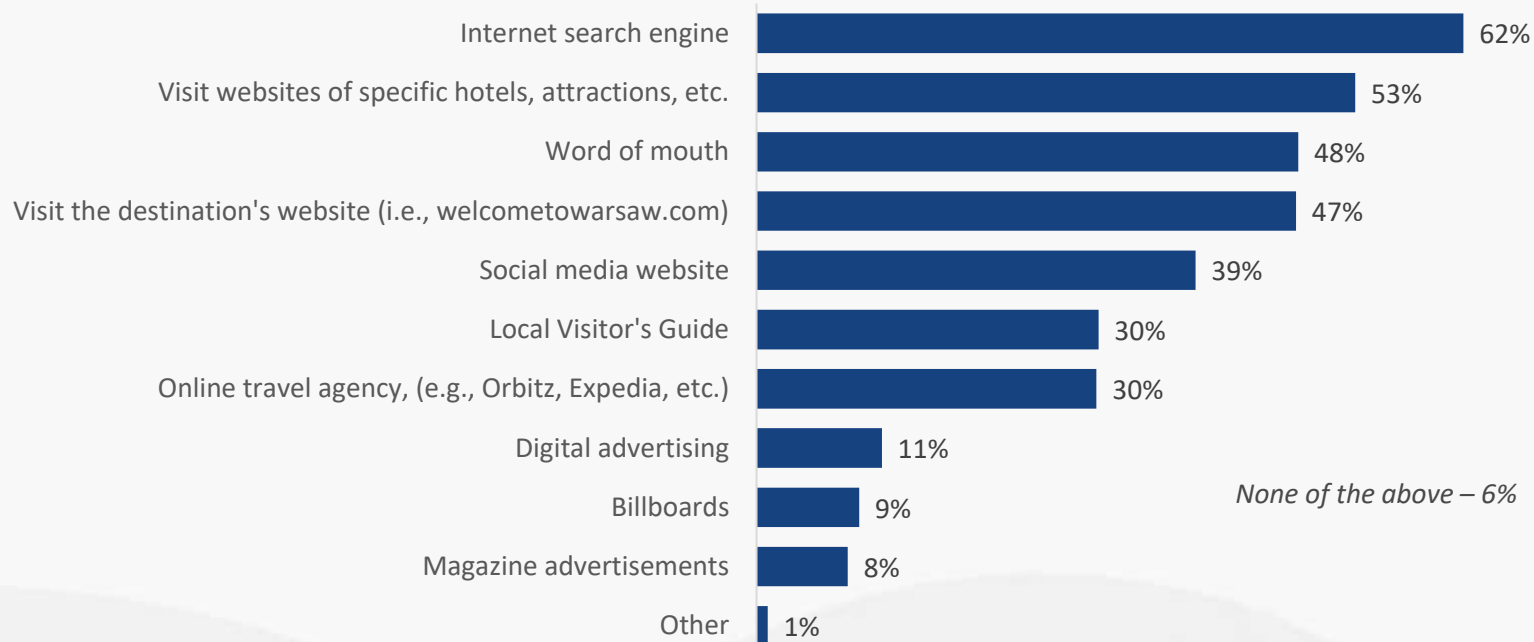
Share of Voice by Consumer Segment



Internet search engines are the main source travelers are likely to use when planning a trip, followed distantly by specific websites and word of mouth.

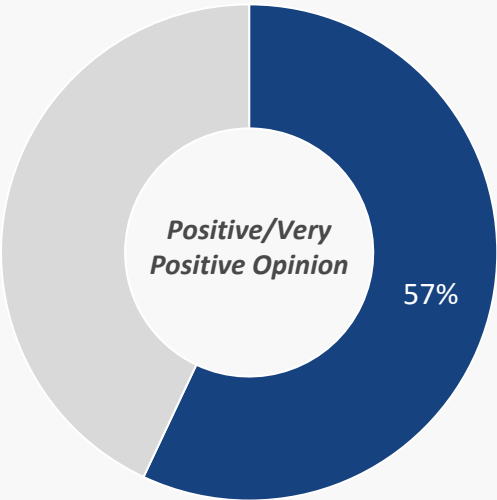
Media Sources Most Likely to Use When Trip Planning

Select All That Apply

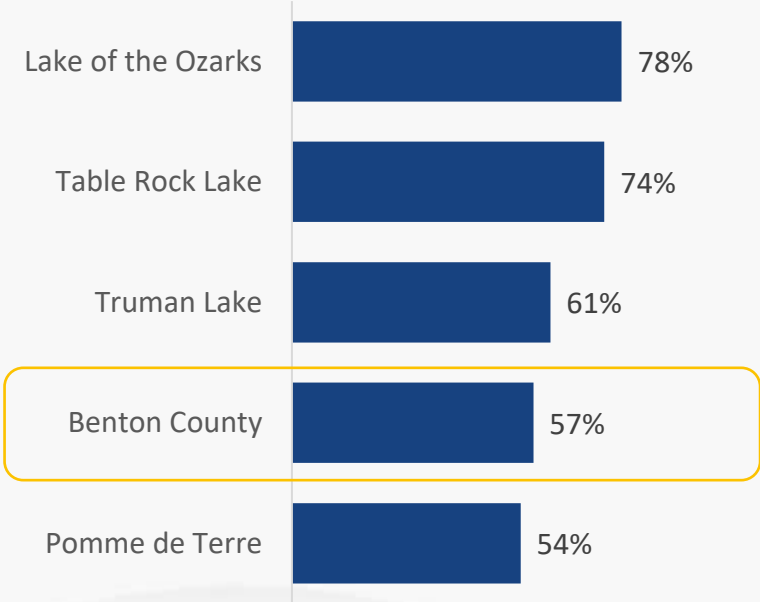


More than half (57%) of regional travelers among the panel have a positive opinion of Benton County. This falls slightly below average among the competitive set, but it ranks higher than Pomme de Terre and is on par with the H2R Norm.

Reputation – Benton County



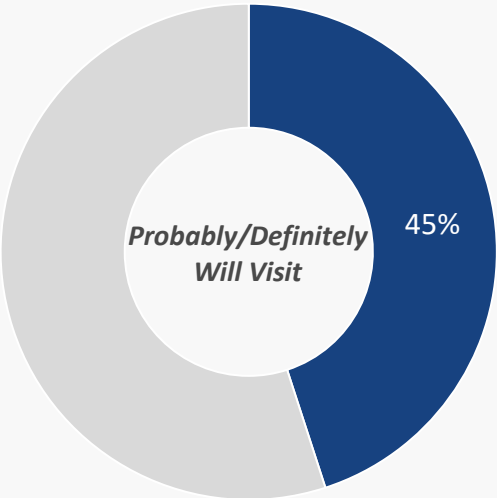
Reputation – Competitive Set



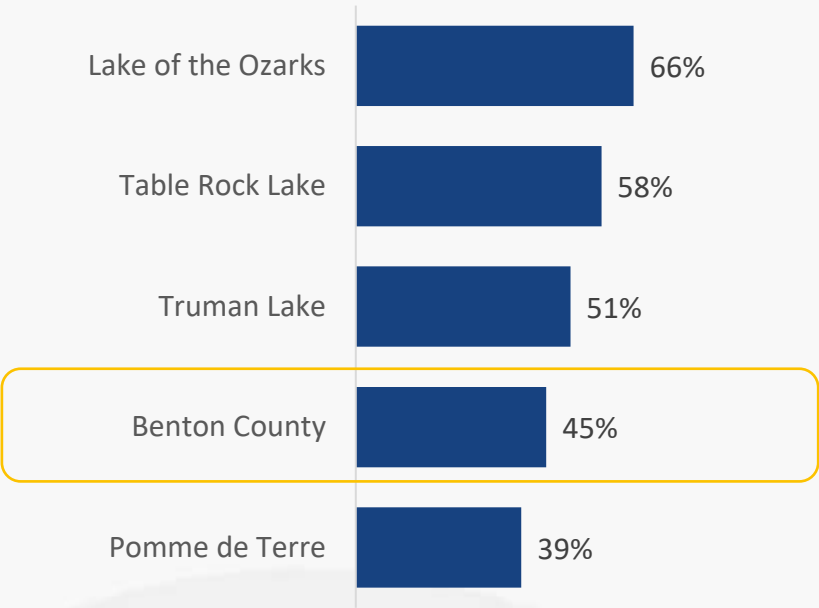
Competitive Set Average: 65%
H2R Norm: 57%

Similarly, more than four in ten regional travelers intend to visit Benton County within the next year, which once again ranks slightly below average for the competitive set (52%), but above both Pomme de Terre and H2R's Norm.

Intent to Visit Next 12 Months – Benton County



Intent to Visit Next 12 Months – Competitive Set



Competitive Set Averages: 52%
H2R Norm for Aware: 35%

Q11: Please indicate how likely you are to visit each of the following destinations in the next 12 months. 5-pt. scale



Benton County's overarching brand health trails the competitive set across most brand health metrics – possibly due to a smaller marketing budget and/or a smaller market capture rate.

Brand Health Summary	Benton Co. Value Index*	Lake of the Ozarks	Pomme de Terre	Table Rock Lake	Truman Lake	Comp Set Average
Market Share – 3 Years	16% 84	36%	8%	21%	13%	19%
Market Share – Ever Visited	48% 100	69%	27%	56%	42%	48%
Conversion Rate	21% 91	39%	14%	25%	17%	23%
Retention Rate	34% 94	52%	28%	37%	31%	36%
Reputation	57% 88	78%	54%	74%	61%	65%
Intent to Visit	45% 87	66%	39%	58%	51%	52%

*Index = Benton County's value for each metric relative to the comp set average (*100)

01. Brand Health

02. Brand Perception

N=410

03. Barriers to Visitation

04. Benton County Visitor Profile

What differentiates Benton County from other regional destinations?

Regional travelers feel that it is the close proximity to lakes and the availability of natural beauty and a plethora of outdoor recreational activities that most distinguish Benton County from other regional destinations. Other distinguishing factors include the small town and family friendly atmosphere with a unique culture and history.

Lakes & Water Activities

Near Lake of the Ozarks and Truman Lake; availability of many water activities and fishing opportunities.

Natural Beauty & Outdoor Recreation

Beautiful scenery and density of nature with lots of camping spots and hiking or walking trails.

Small Town Atmosphere

Small town atmosphere that's quiet and not too crowded; laid-back and friendly locals.

Family Friendly & Affordable

Good spot for family time and fun for the kids; less expensive than bigger destinations.

Unique Local Culture & History

Historic atmosphere with cultural and historic adventures, unique shops and an Old Town Feel.

Regional travelers most seek out affordable destinations that have a variety of clean hotels and a safe, wholesome environment. They also look for unique local restaurants and places that enable them to do things they do everyday.

Attributes/Characteristics Important When Considering Destination to Visit
% Very/Extremely Important



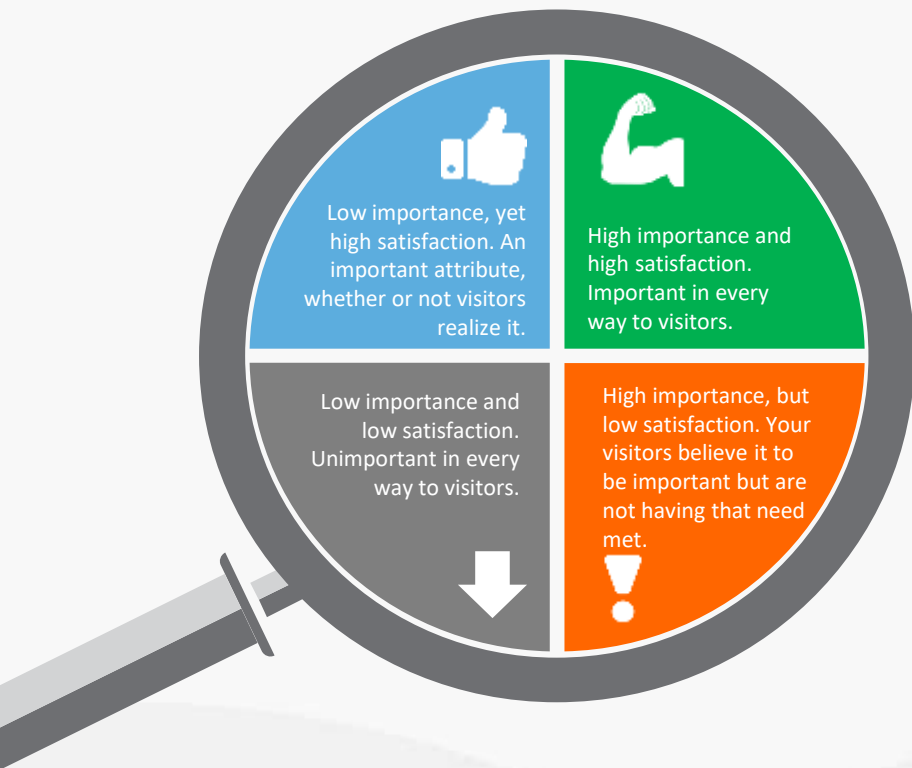
Visitors to Benton County feel that the area can best be described by its water activities, outdoor recreation, affordability and its ability to allow visitors to do something they can't do on an everyday basis at home.

Attributes/Characteristics Describing Benton County

% Describes Very Well/Perfectly



H2R Strengths Finder

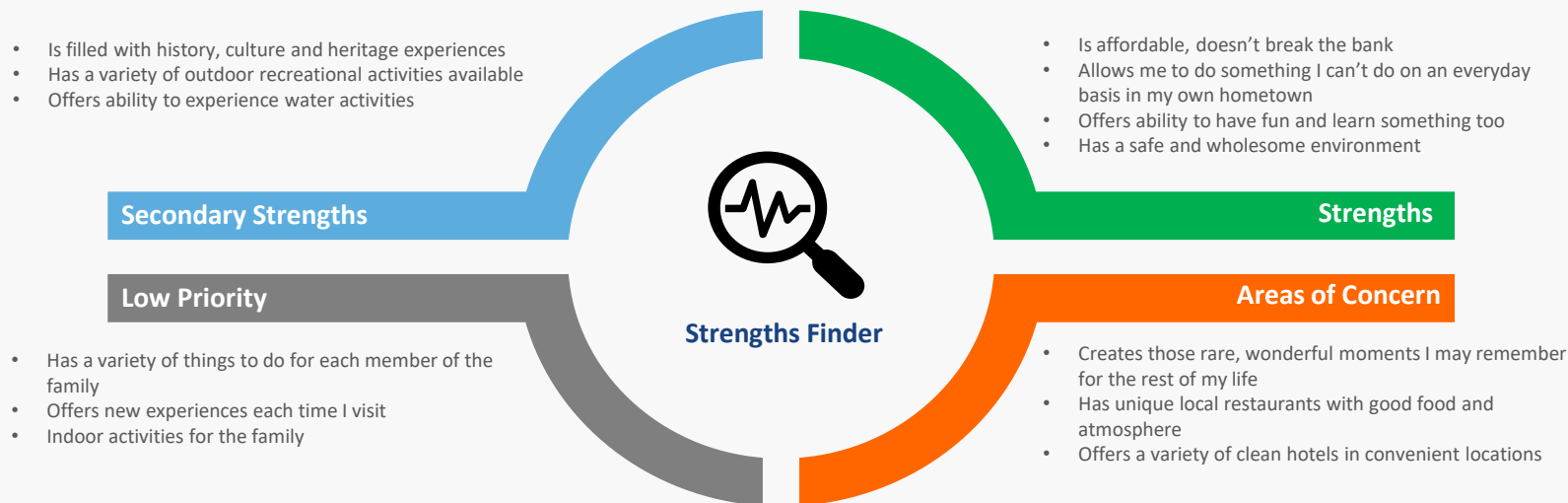


Each of Benton County's brand attributes were analyzed and categorized into four buckets. Strengths Finder evaluates the relative importance of each element of the brand alongside how well travelers believe these attributes describe Benton County.

Respondents' scores for importance are plotted on the X-axis while the scores for descriptiveness are plotted on the Y-axis. The average scores for each create the breaking points for the quadrants.

The resulting analysis illustrates how the elements of brand perception play a role by plotting each characteristic into one of four quadrants.

Benton County has numerous strengths including affordability and offering visitors something they can't do everyday at home. However, there were some areas of concern, such as unique local restaurants and variety of hotel options.



Q6: Please indicate how important you find each of the following attributes or characteristics when thinking about destinations you'd like to visit. 5-pt. scale

Q18: Please rate how well you believe the following attributes describe Benton County. 5-pt. scale

Based on visitors ever; N=201

How would you describe this area of Missouri?

While a good number of travelers indicated they were not familiar with this part of Missouri, those who were described the area as having a good number of lakes and therefore water activities, plenty of natural beauty and outdoor recreational opportunities and being home to small towns that are quiet and relaxing.



Lakes & Water Activities

Near Lake of the Ozarks and Truman Lake; availability of many water activities and fishing opportunities.

Natural Beauty & Outdoor Recreation

Beautiful scenery and density of nature with lots of trees and countryside; nice place to go camping, fish and walk trails.

Small Towns & Communities

Small towns such as Lincoln, Warsaw, Cole Camp and Climax Springs that offer different adventures and down-home feelings.

Proximity to Ozarks

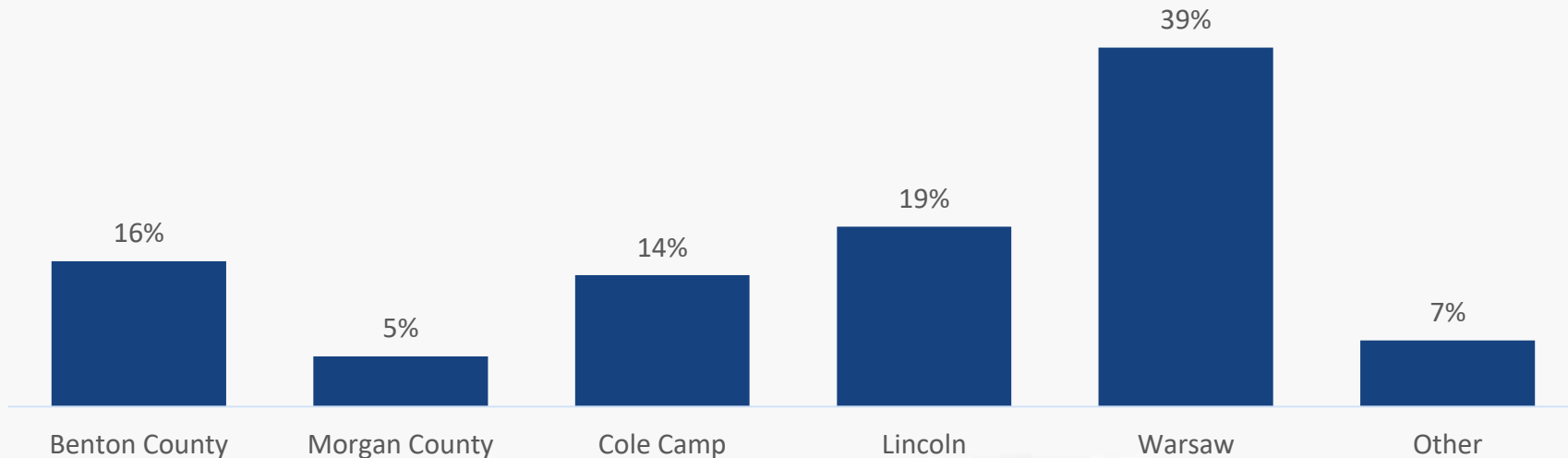
An area near the Ozarks, but not quite there.

Quiet & Relaxing

Quiet, safe and peaceful area and is laid back.

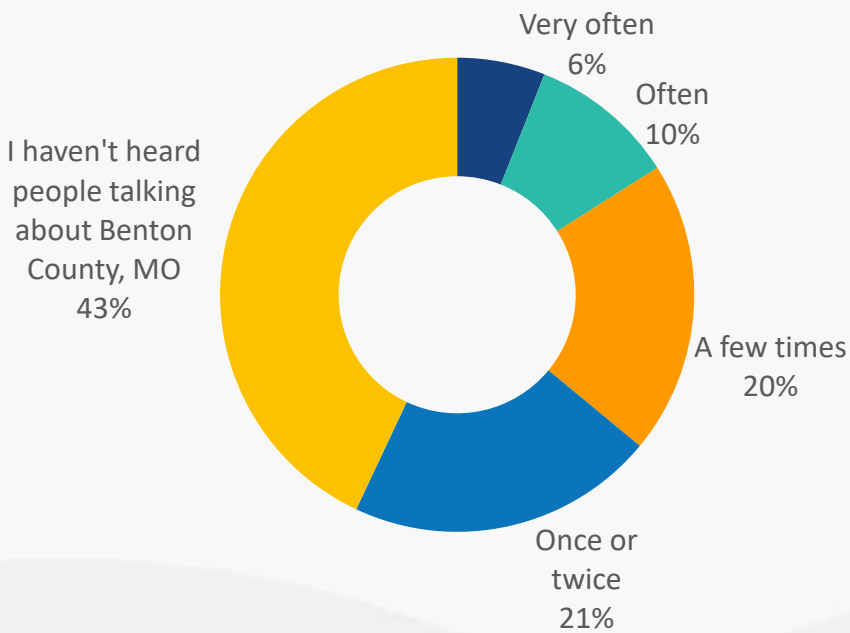
Most regional travelers reference the Benton County area as Warsaw, followed distantly by Lincoln, Benton County and Cole Camp.

Terms Used to Reference the Area Where Benton County Exists

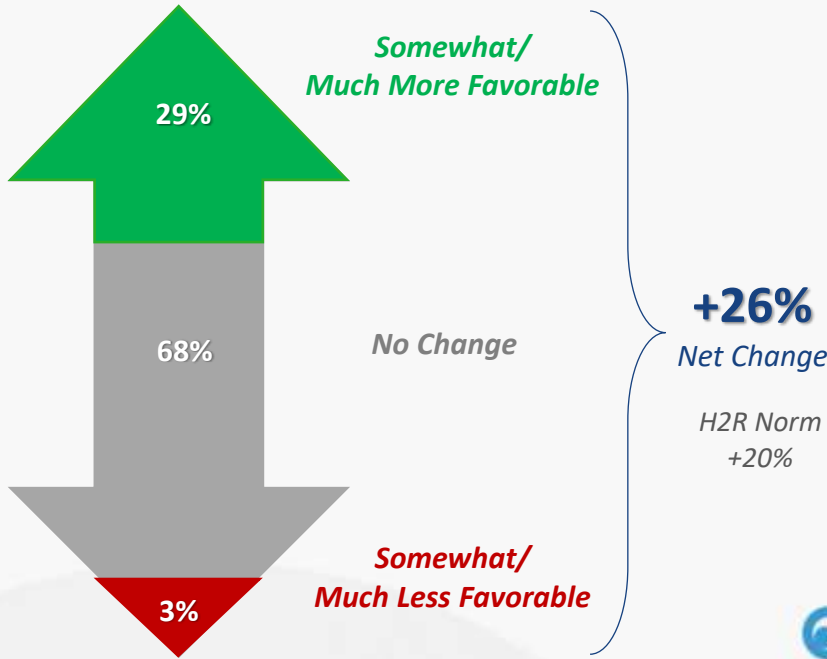


More than half of regional travelers have heard someone talking about Benton County at least once in the past 6 months. And the things travelers have heard created a more favorable opinion of the destination more than a quarter of the time.

Market Buzz



Change in Perception of Benton County Over Past Six Months



Q15: In the past 6 months, how often have you heard people talking about Benton County, MO?
Q16: How has your perception of Benton County, MO changed in the past 6 months? 5-pt. scale



01. Brand Perception

02. Brand Health

03. Barriers to Visitation

N=335

04. Benton County Visitor Profile

Barriers to Visitation Methodology

Barriers are the obstacles or pain points that prevent some prospects from visiting or returning to Benton County, Missouri.

Stated Barriers

Level of agreement with a list of reasons for why prospects have not visited, or not visited recently (or why they are not likely to return/are visiting less often).



Derived Barriers

Correlation analysis reveals alignment of stated reasons with intent to visit. The higher the correlation with low intent to visit in the next 12 months, the more credible the barrier is as a root cause.

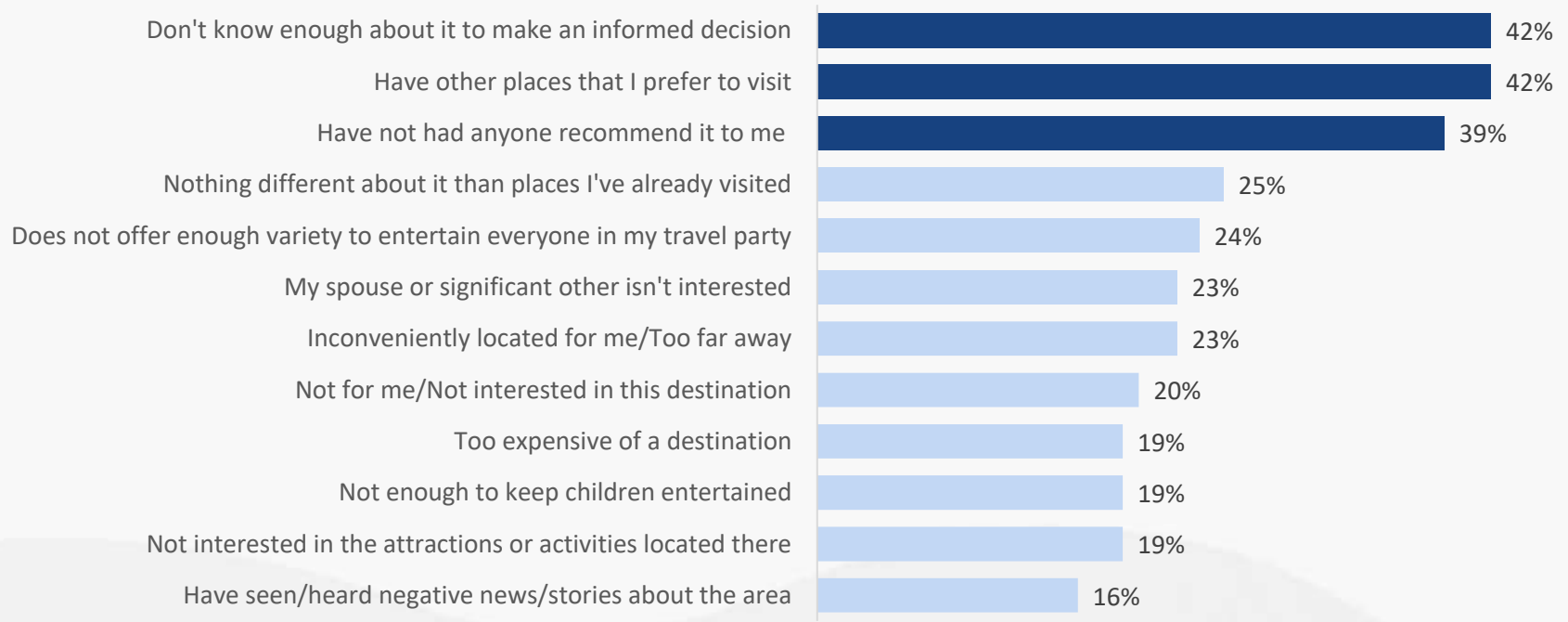


Weighted Barriers

Combines the results of stated and derived by multiplying: Size of Segment x Stated Ratings x Derived. The weighted result identifies the most credible barriers.

Regional travelers who have never visited Benton County are most likely to cite a lack of information and a higher preference for other destinations. But other key barriers to visitation include lack of recommendations and not different enough from other destinations already visited.

Stated Barriers to Visiting Benton County
% Agree/Strongly Agree



Q33: Do you have any particular reason why you have never visited, or not visited recently, the Benton County area? 5-pt. scale

Based on non-visitors; N=209



Derived barriers reveal that perhaps better explanations for not visiting Benton County are that it is not well differentiated and a preference for other places along with a lack of interest in both the destination itself and the activities offered there.

STATED BARRIERS

1. Don't know enough about it to make an informed decision
2. Have other places that I prefer to visit
3. Have not had anyone recommend it to me
4. Nothing different about it than places I've already visited
5. Does not offer enough variety to entertain everyone in my party
6. My spouse or significant other isn't interested
7. Inconveniently located for me/Too far away
8. Not for me/Not interested in this destination
9. Too expensive of a destination
10. Not enough to keep children entertained

DERIVED BARRIERS

1. Nothing different about it than places I've already visited
2. Have other places that I prefer to visit
3. Not for me/Not interested in this destination
4. Not interested in the attractions or activities located there
5. Have not had anyone recommend it to me
6. My spouse or significant other isn't interested
7. Don't know enough about it to make an informed decision
8. Does not offer enough variety to entertain everyone in my party
9. Too expensive of a destination
10. Not enough to keep children entertained

Regional travelers who have not visited Benton County in the past three years are most likely to cite a higher preference for other destinations as their main reason for not returning. But other key hurdles include the destination not being top of mind or not having any “must sees” compelling a return visit.

Stated Hurdles to Returning Benton County
% Agree/Strongly Agree



Q33: Do you have any particular reason why you have never visited, or not visited recently, the Benton County area? 5-pt. scale

Based on lapsed visitors; N=126



The top derived hurdles align with the stated hurdles. However, correlation with intent to return reveals that the area’s lack of good restaurants plays a bigger role than lapsed visitors let on.

STATED HURDLES

- | |
|---|
| 1. Have other places that I prefer to visit |
| 2. Never really think about when planning my leisure trips |
| 3. There is no “must see” experience compelling me to return |
| 4. Been there before and looking for new things to see and do now |
| 5. Have not had anyone recommend it to me |
| 6. Inconveniently located for me/Too far away |
| 7. My spouse or significant other isn’t interested |
| 8. Not enough good restaurants |

- | |
|--|
| 9. Does not offer enough variety to entertain everyone in my party |
| 10. Not enough quality lodging options |

DERIVED HURDLES

- | |
|---|
| 1. There is no “must see” experience compelling me to return |
| 2. Have other places that I prefer to visit |
| 3. Never really think about when planning my leisure trips |
| 4. Been there before and looking for new things to see and do now |
| 5. Not enough good restaurants |

- | |
|---|
| 6. Have not had anyone recommend it to me |
| 7. Not enough to keep children entertained |
| 8. Not enough quality lodging options |
| 9. My spouse or significant other isn’t interested |
| 10. Does not offer enough variety to entertain everyone in my party |

What might motivate or inspire a visit to Benton County, Missouri?

Non-visitors and lapsed visitors alike would be most motivated to visit the Benton County area to enjoy the wide variety of outdoor activities offered, especially if their friends or family wanted to go. Feeling like the visit wouldn't break the bank would also help, along with the availability of fun attractions or events and good restaurants.

Outdoor Activities & Natural Beauty

Fun activities such as boating, tubing, fishing, hiking and camping.

Family & Friends Wanting to Go

Friends or family members needing a weekend getaway before school starts or to get away from stress of everyday life.

Affordability & Discounts

Being able to take a trip that doesn't break the bank; availability of good deals and discounted prices.

Specific Attractions & Events

Antique shops, sporting events, museums or other enticing attractions; fun events like Heritage Days.

Food & Dining

Good food and drink places.

01. Brand Perception

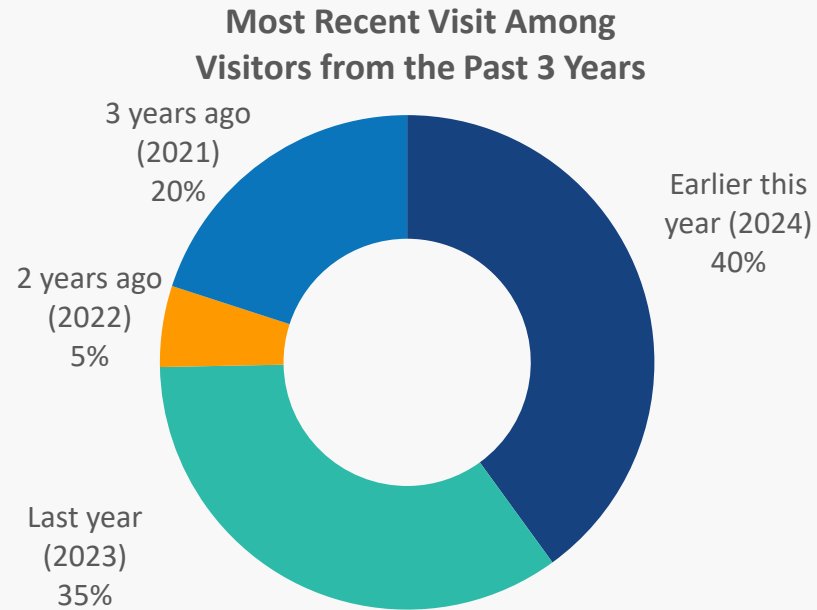
02. Brand Health

03. Barriers to Visitation

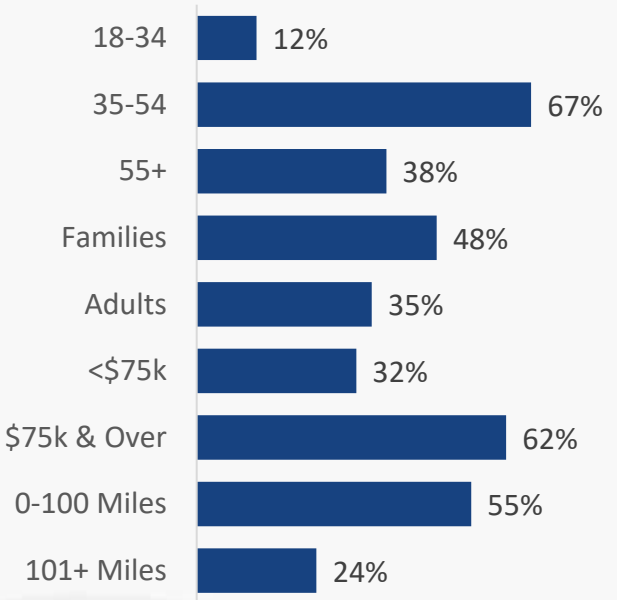
04. Benton County Visitor Profile

N=75

Four in ten of Benton County’s recent visitors indicated that their most recent visit occurred earlier this year. This was especially true of middle-aged travelers, those with household incomes above \$75k and those living within 100 miles.



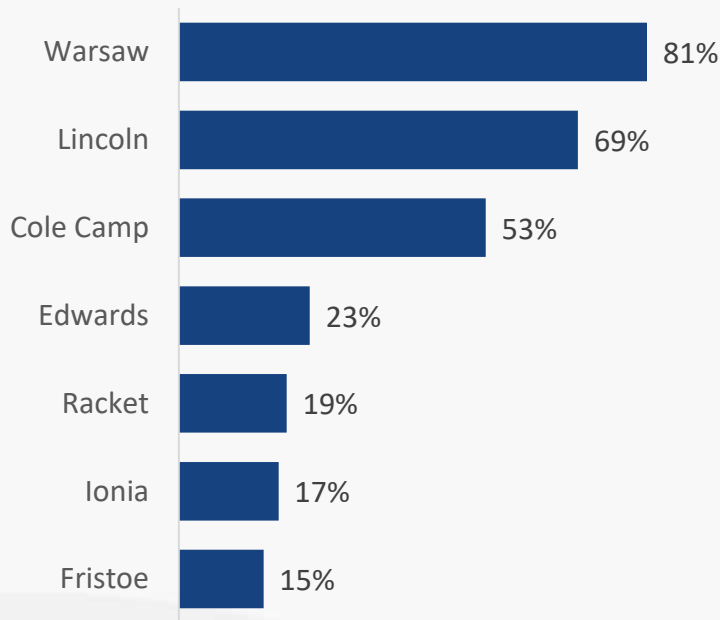
Visited Earlier This Year by Segment



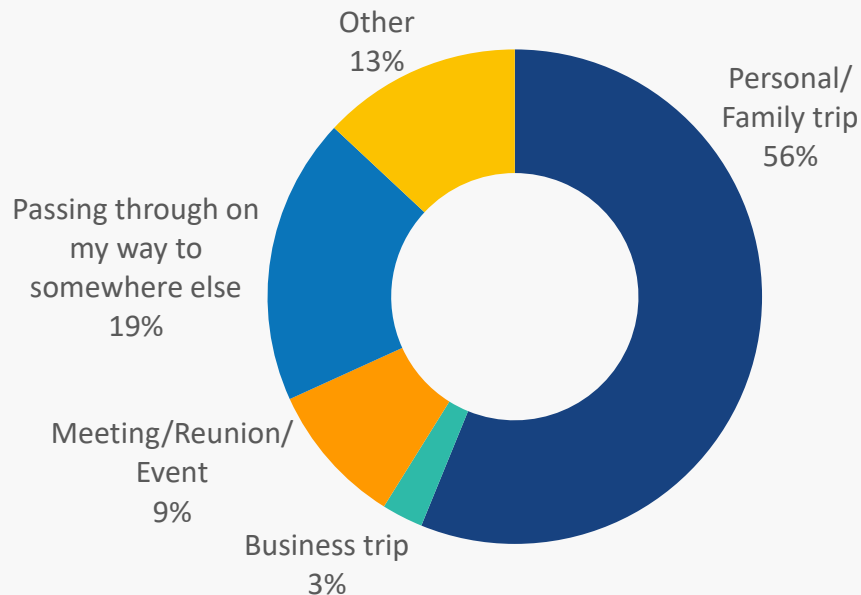
Most Benton County visitors say they have visited Warsaw, Lincoln and Cole Camp for a personal or family trip.

Towns Travelers Have Visited in Benton County

Select All That Apply



Primary Purpose of Trip to Benton County



Q20: Which of the following town(s) in Benton County have you visited? Please select all that apply.

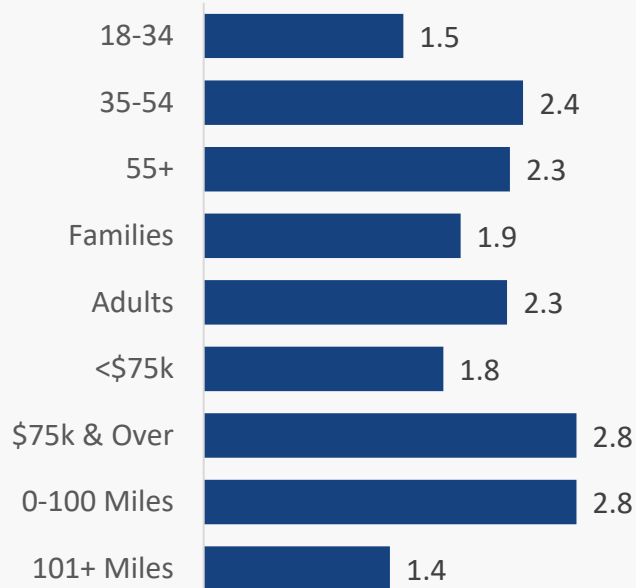
Q22: What was the primary purpose of your trip to the Benton County area on your most recent visit?

Recent Benton County visitors typically visit at least one time per year, with the average visitor visiting roughly twice per year. Those visiting the most often are those with higher incomes living within 100 miles.

Frequency of Visitation to Benton County



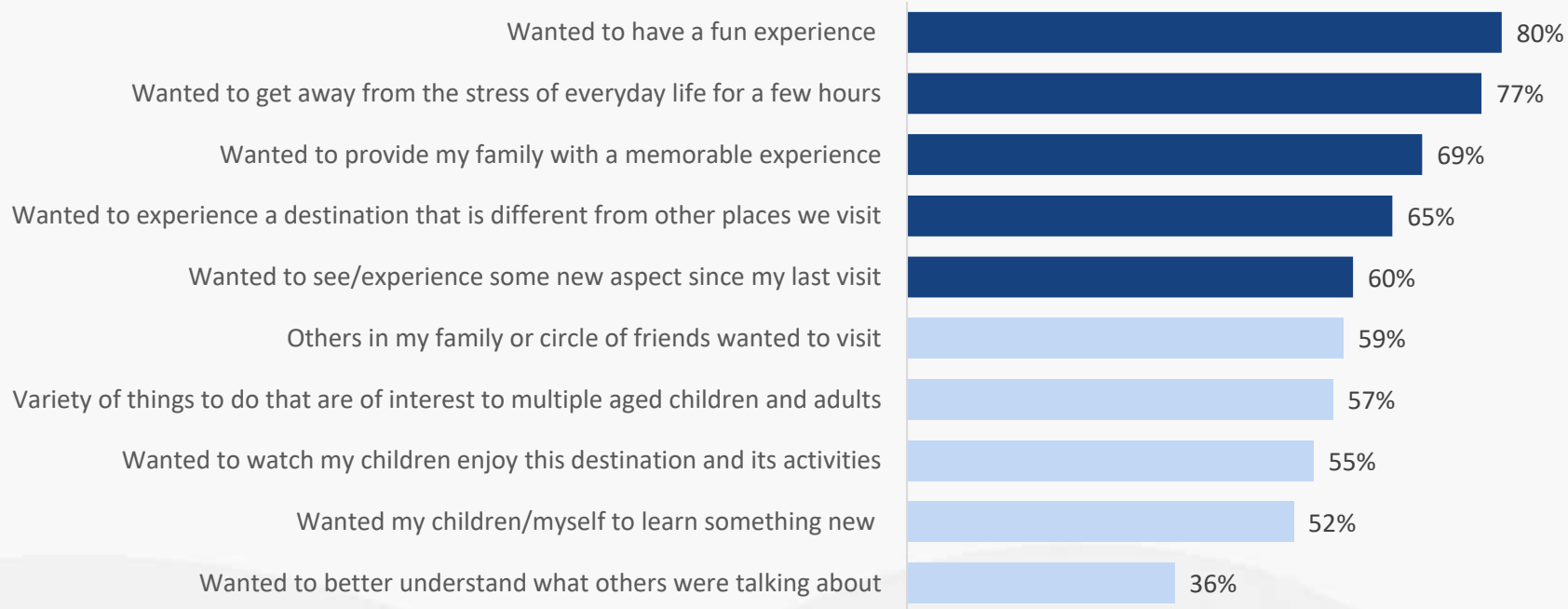
Visits Per Year by Segment



Most visitors indicated they were motivated to visit Benton County by their desire for a fun experience, to get away from the stress of everyday life and/or the desire to provide their family with a memorable experience.

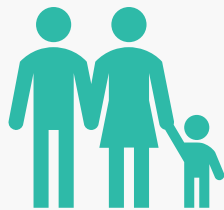
Motivations Important to Decision to Visit Benton County on Last Trip

% Somewhat/Very Important



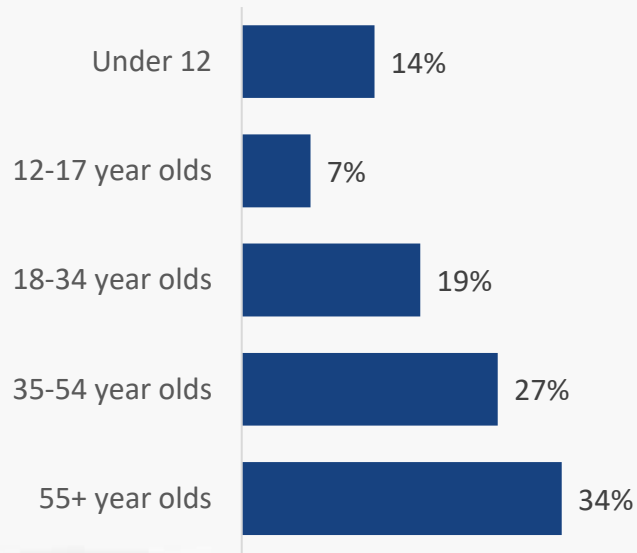
Benton County's average adult visitor is 49.7 years old, has an average party size of 2.79, and nearly two in three are families with children in their party.

Party Composition



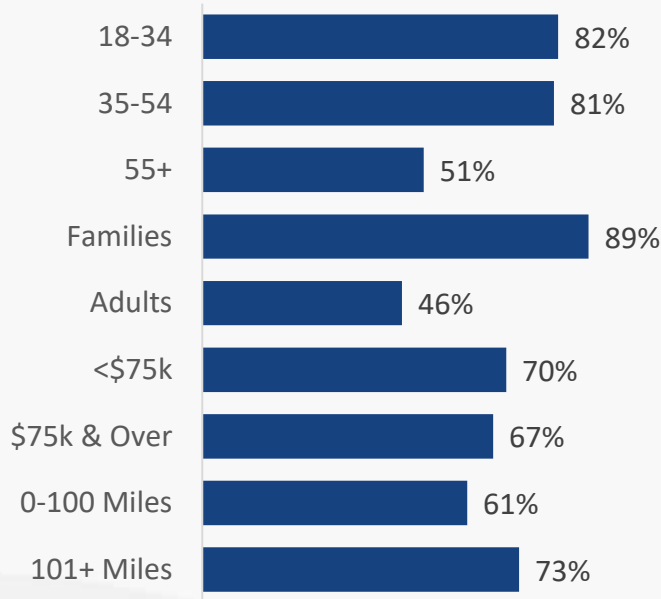
*Average Adult Age: 49.7
Average Child Age: 8.8
Average party size: 2.79*

Party Ages

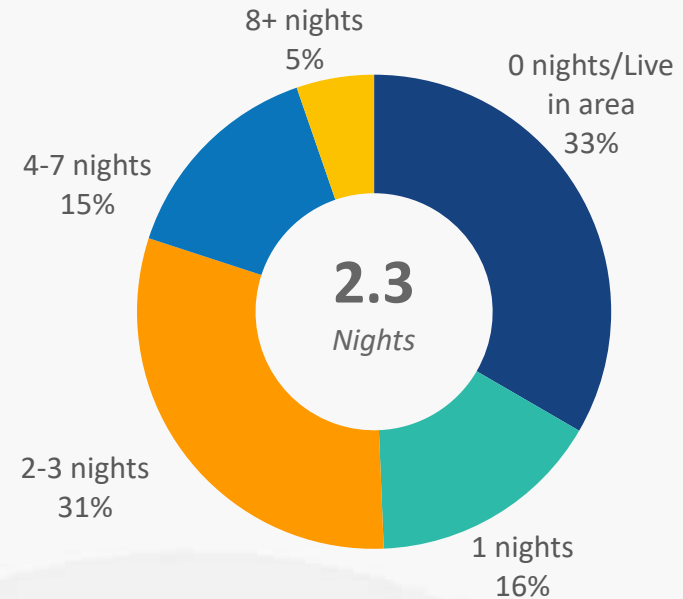


Roughly two in three Benton County visitors spent the night during their last visit to the area, with overnight visitors spending an average of 2.3 nights. Younger travelers, families and those living over 100 miles away were the most likely to spend the night during a visit to the area.

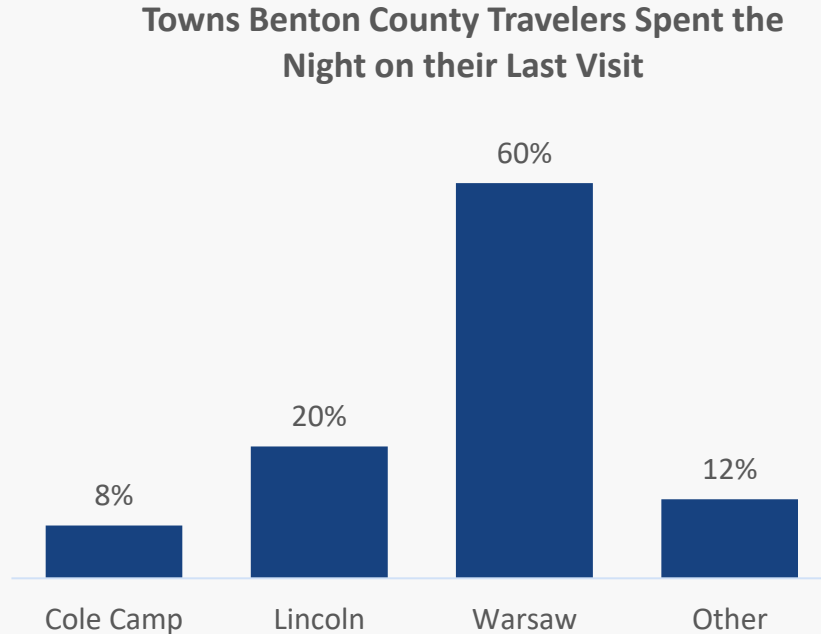
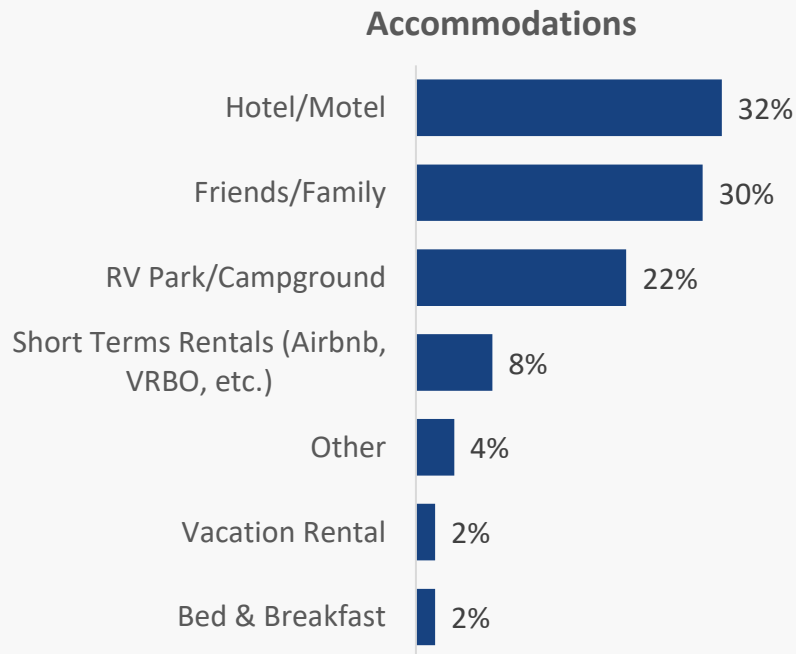
Spent the Night by Segment



Length of Stay



The majority of overnight visitors to Benton County report staying overnight in Warsaw, followed distantly by Lincoln. Hotels or with family or friends were the most popular accommodation choices.

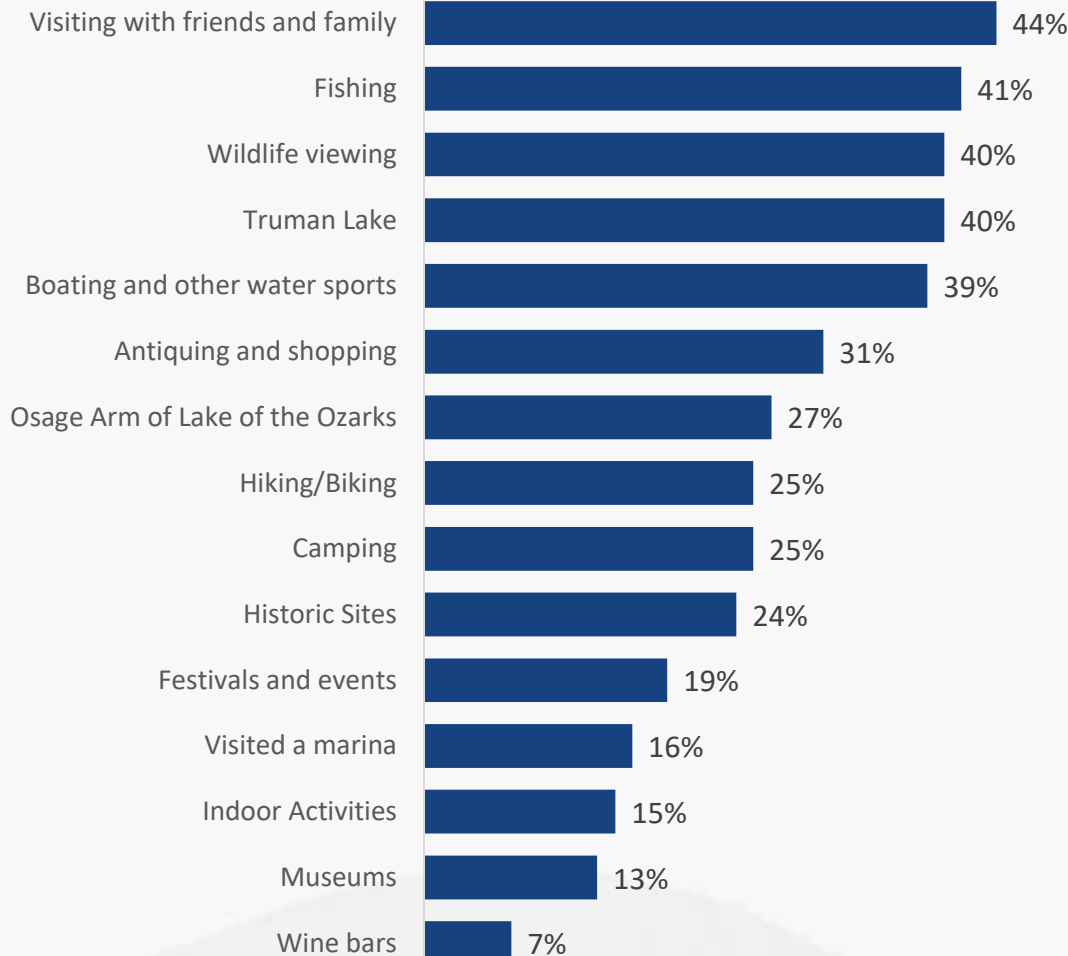


Benton County Area Activity Participation

Benton County visitors indicate they were most likely to have visited friends and family during their visit. They also were likely to have gone fishing, wildlife viewing, visited Truman Lake or participated in boating or other water sports.

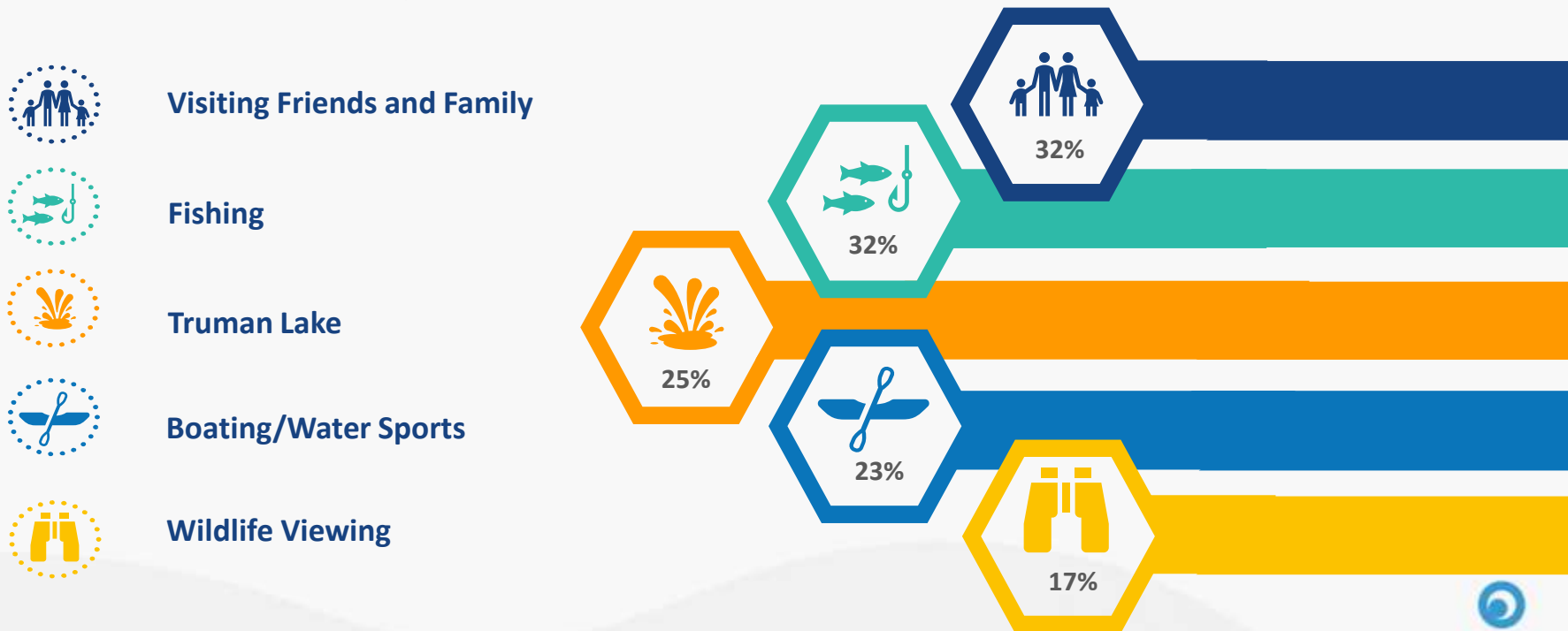
Conversely, comparatively few visited wine bars, museums or participated in indoor activities.

The few who visited a marina listed a wide variety of nearby ones, such as Long Shoal, Osage or one at a state park.



The functional drivers most responsible for generating the last trip include visiting friends and family, fishing, Truman Lake, boating and water sports and wildlife viewing.

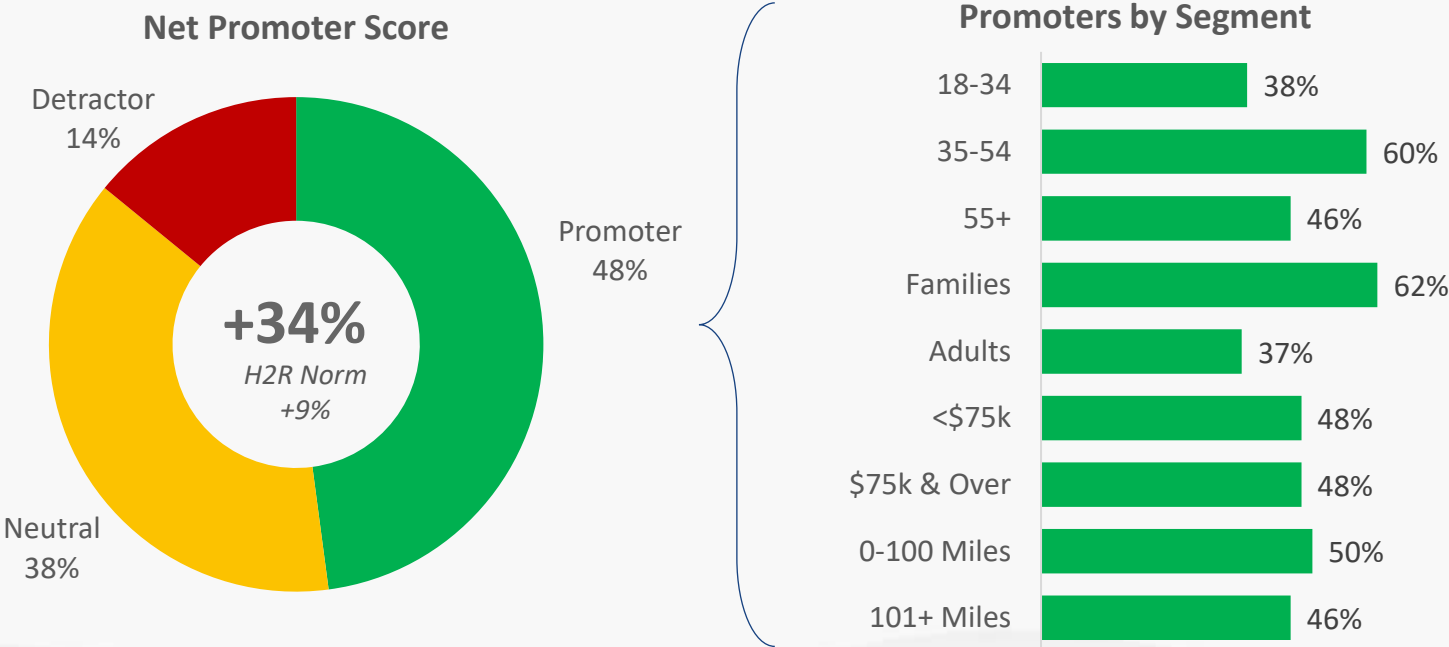
Top 5 Activities with Greatest Influence on Decision to Visit



Q29: Of the activities, please indicate if any were a major influence in your visiting Benton County on that visit. You may choose up to 3.

Based on visitors who participated in area activities; N=71

Recent Benton County visitors are more likely to recommend the area to friends and family than not, creating a positive Net Promoter Score of 34% and well above the H2R Norm. Families are the most likely to promote the area, significantly more than their counterparts.



Visitor Profile

Benton County visitors stand out from non-visitors in a few key areas, and recent visitors specifically stand out in a few areas from lapsed.

The average household income for Benton County visitors is roughly \$9.0k below that of lapsed visitors, but \$5.1k higher than non-visitors. This is a trend H2R has seen in destinations across the country —those doing a lot of traveling are those with higher incomes. Lapsed visitors are likely to be traveling, but just choosing alternative destinations.

The most notable difference between recent and lapsed visitors is household composition. Lapsed visitors tend to skew towards adult-only households, while recent skew towards households with children.

While non-visitors look more like recent visitors when it comes to household composition, they differ more across other key areas—age (-10.1 years), more diverse (+8 points) and female (+6 points) visitation.

		Recent Visitors	Lapsed Visitors	Non-Visitors
Gender	Male	41%	46%	34%
	Female	59%	54%	65%
Respondent Age	Avg. Age	51.6	51.6	41.5
	18-34 Years	23%	25%	39%
	35-54 Years	28%	27%	40%
	55+ Years	49%	48%	21%
Average Household Income		\$68.1k	\$77.1k	\$63.0k
Household Income	<\$75k	71%	61%	75%
	\$75k+	29%	39%	25%
Household Ages	Under 12 Years	18%	9%	18%
	12-17 Years	9%	9%	9%
	18-34 Years	19%	25%	30%
	35-54 Years	20%	22%	21%
	55+ Years	34%	35%	22%
Household Size		2.5	2.3	1.7
Household Composition	Families	56%	42%	60%
	Adults	44%	58%	40%
Ethnicity	Non-Hispanic White	81%	87%	73%
	People of Color	19%	13%	27%

Demographics

		Overall	0-50 Miles	51-100 Miles	101-300 Miles
Gender	Male	39%	38%	41%	39%
	Female	60%	62%	59%	61%
Respondent Age	Avg. Age	46.4	60.5	50.6	43.8
	18-34 Years	32%	8%	32%	34%
	35-54 Years	34%	21%	20%	39%
	55+ Years	34%	71%	48%	27%
Average Household Income		\$68.3k	\$71.5k	\$81.3k	\$63.5k
Household Income	<\$75k	70%	67%	60%	73%
	\$75k+	30%	33%	40%	27%
Household Ages	Under 12 Years	15%	15%	16%	15%
	12-17 Years	9%	9%	8%	9%
	18-34 Years	25%	12%	25%	27%
	35-54 Years	21%	15%	16%	24%
	55+ Years	30%	49%	35%	25%
Household Size		2.0	2.5	2.3	1.9
Household Composition	Families	54%	49%	51%	55%
	Adults	46%	51%	49%	45%
Ethnicity	Non-Hispanic White	79%	92%	81%	77%
	People of Color	21%	8%	19%	23%

Research developed for Benton County by H2R Market Research.

Our team loves the magic of data and research. We work until the voice of your customer is clear and you have the answers you need. If you have questions about this report, please let us know:

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